

Service Area Plan

Jamestown-Yorktown Foundation

Operational and Support Services (14507)

Service Area Background Information

Service Area Description

Operational and Support Services includes the following areas: Finance, Human Resources, Safety and Security, Marketing and Retail Operations, Development, Facilities and Maintenance and the Deputy Executive and Executive offices.

Service Area Alignment to Mission

Operational and Support Services supports the JYF mission, as well as the statewide goal of being recognized as the best managed state in the nation, by providing the executive leadership and day-to-day critical services to the museums and its operation.

Service Area Statutory Authority

§ 23-287 of the Code of Virginia establishes JYF as an educational institution to administer certain historical museums and related programs. It is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of American independence on the battlefield at Yorktown, and to enhance our understanding of the making of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

In addition, JYF has the authority to establish nonprofit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by JYF and such agreements or contracts are based on competitive principles. It may also determine what paintings, statuary, works of art, manuscripts, and artifacts may be acquired by purchase, gift or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan or other acquisition.

Service Area Customer Base

| Customer(s) | Served | Potential |
|------------------------------|--------|-----------|
| APA | 1 | 1 |
| BCOM | 1 | 1 |
| Department of Education | 1 | 1 |
| DPB | 1 | 1 |
| General Assembly | 1 | 1 |
| Private and corporate donors | 2,057 | 5,000 |
| The Foundation's museums | 2 | 2 |

Service Area Partners

Jamestown-Yorktown Foundation, Inc.

JYF, Inc. coordinates private fund development in support of JYF programs. JYF, Inc., through receipt of private donations and gifts, expends funds to benefit the operations and educational programs of the JYF museums.

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Service Area Products and Services

- Finance Department: Maintains accurate accounts payable and receivables. Provides other accounting functions including payroll, budget analysis and procurement. Prepares background information and recommendations for budget amendments. Prepares monthly financial reporting for two state and agencies and three private affiliates that clearly delineates each entity's financial support. Prepares accurate, timely financial reporting for grants and restricted gift donations. Prepares monthly report on departmental activities to Deputy Executive Director of Administration for inclusion in board reports.
- Facilities and Maintenance: Provides the management and delivery of JYF's capital program and maintenance of its facilities and equipment.
- Marketing and Retail Operations: Department designs and implements marketing programs, including advertising, media relations services, sales and promotions, on-site advertising agency and graphic design and the historyisfun.org Web site, and manages on-site retail and food services to generate paid admissions to JS and the YVC.
- Development: The Development Office provides full strategic and operational support to fund development efforts of JYF and its non-profit affiliate, JYF, Inc.
- Human Resources: Provides human resource support to internal and external customers. Enforcement of state employment regulations, listing of new positions, processing of newly hired employees, employee benefit advisement, and records management.
- Security and Safety Services: Provides a safe environment for visitors and staff, and to protect the collections, facilities and other physical assets of JYF against loss from fire, theft and willful destruction.
- Executive and Deputy Executive Offices: Provides the leadership and management of JYF.
- Information Technology: An organizational framework that supports the business objectives of JYF through hardware and software standardization a help desk, upgrades and maintenance of equipment.

Factors Impacting Service Area Products and Services

The growing demands of the commemoration will stretch the capabilities and capacities of Operational and Support Services to its limit during the 2006 - 2008 biennium. Retention of key employees and crucial support of needed resources will be vital to moral, productivity and quality service levels.

Anticipated Changes To Service Area Products and Services

While managing to changing service levels preceding and during the commemoration presents its own set of critical issues, equally challenging will be the management of the post-commemorative transition.

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Service Area Financial Summary

Funding for Operational and Support Services comes from general funds (59%) and from non-general funds (41%)-largely admissions revenue.

| | <u>Fiscal Year 2007</u> | | <u>Fiscal Year 2008</u> | |
|---------------------------|-------------------------|--------------------|-------------------------|--------------------|
| | General Fund | Nongeneral Fund | General Fund | Nongeneral Fund |
| Base Budget | \$5,669,897 | \$3,880,164 | \$5,669,897 | \$3,880,164 |
| Changes To Base | \$273,735 | \$353,142 | \$280,801 | \$495,431 |
| SERVICE AREA TOTAL | \$5,943,632 | \$4,233,306 | \$5,950,698 | \$4,375,595 |

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Service Area Objectives, Measures, and Strategies

Objective 14507.01

JYF will meet or exceed the state compliance established under the Virginia Excels program.

This Objective Supports the Following Agency Goals:

- MANAGEMENT AND GOVERNANCE GOAL: Ensure that all operations and programs are consistent with JYF's mission and comply with Board policies, government regulations, and professional museum standards.

This Objective Has The Following Measure(s):

- **Measure 14507.01.01**

Per Cent of Governor's Management Scorecard that meet expectations.

Measure Type: Outcome **Measure Frequency:** Annually

Measure Baseline: 83% in FY2005.

Measure Target: 100%

Measure Source and Calculation:

Percent of Governor's Management scorecard categories marked as meets expectations for the agency

Objective 14507.01 Has the Following Strategies:

- Maintain accreditation by the American Association of Museums.
- Promote working relationship between JYF and its private affiliates.
- Continue evaluation and consolidation of JYF's management and operation systems.
- Ensure qualified paid and volunteer staff are attracted and retained.
- Ensure that the agency adheres to all state and other government policies and regulations (e.g., financial, procurement, human resources, and capital outlay).
- Every other year, review and revise with the Board of Trustees the Strategic Long-Range Plan.
- Ensure effective board and committee meetings.
- Enhance communications and working relationships between staff and boards.
- Provide the fiscal, personnel and organizational resources and structure necessary to support activities planned and implemented during the 2006 - 2008 biennium.
- Provide timely and relevant financial information to effectively manage JYF and private affiliate resources.
- Intensify efforts beyond that permitted under the base budget to attract and retain qualified volunteers and staff, as resources allow.
- Significantly increase JYF's competitiveness to attract and retain qualified personnel in keeping with state policy.
- Make greater use of technology to communicate with the public and to operate in a more effective and efficient manner.

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- Maintain sufficient staffing and resources to meet compliance and service levels as agency expands while operating in an effective and efficient manner.
- Promote adequate state government support for operating, capital and maintenance expenses.
- Maximize non-general fund income from gift shops and commissions.
- Develop national, regional and local awareness of JYF among potential visitors, the legislature, government agencies and local residents.
- Extend JYF educational mission through the sale of historically relevant and educational products.
- Enhance ongoing cooperation and explore future promotional and working opportunities with other agencies.
- Implement the agency's Capital Improvement Plan in conjunction with the provisions of the Commonwealth of Virginia Construction and Professional Services Manual.
- Operate and maintain additional buildings and expanded grounds in accordance with JYF standards.
- Operate and maintain facilities during periods of peak visitation during the commemoration.
- Construct necessary improvements to the museums to ensure their continued ability to attract visitation and generate non-general fund revenue.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, calculate detailed project costs, and ensure quality workmanship.
- Provide landscaping improvements in fulfillment of the landscape plan and the need to screen view sheds in order to improve the public product.
- Provide sufficient security to safeguard artifacts and provide public safety.

Objective 14507.02

Generate admissions revenue through an effective marketing program.

This Objective Supports the Following Agency Goals:

- ECONOMIC DEVELOPMENT GOAL: Promote tourism development and quality of life in the region and Commonwealth in a manner consistent with preserving the historic nature and integrity of the Jamestown-Yorktown-Williamsburg area and the Commonwealth.
- MARKETING GOAL: Maximize public awareness of and interest in JYF's mission, living-history programs, educational opportunities and other programs and services, leading to increased paid attendance and earned income.

This Objective Has The Following Measure(s):

- **Measure 14507.02.01**

the ratio of paid admission revenue to the direct media advertising expense.

Measure Type: Input

Measure Frequency: Annually

Measure Baseline: \$4.78 to \$1 in FY2005.

Measure Target: A ratio of \$5 to \$1.

Measure Source and Calculation:

The paid admission revenue divided by the actual direct media advertising expense expressed as a ratio: \$x revenue to \$y expense

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Objective 14507.02 Has the Following Strategies:

- Actively manage admission rate pricing strategy.
- Media relations efforts.
- Expand group sales and packaged tours growth.
- Manage off-site museum admission ticket sales.
- Promote sale of combination and co-op tickets.

Objective 14507.03

Increase admissions revenues by 15% in FY2007 and 28% in FY2008 over FY2005 collections.

This Objective Supports the Following Agency Goals:

- FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

This Objective Has The Following Measure(s):

- **Measure 14507.03.01**

Annual percentage increase in admissions revenues.

Measure Type: Outcome **Measure Frequency:** Other

Measure Baseline: FY2005 admissions revenue of \$4,070,812.

Measure Target: 15% increase over the baseline in FY2007 and 28% over baseline in FY2008.

Measure Source and Calculation:

((FY2007 or FY2008 Admissions revenue minus \$4,070,812) divided by \$4,070,812) times 100.

Objective 14507.03 Has the Following Strategies:

- Develop a new, resourceful advertising and marketing program.
- Manage admission rate pricing strategy to maximize per capita sales while maintaining paid visitation base.
- Expand coverage of JYF museums, education programs, exhibits and special events through media relations efforts.
- Expand group sales and packaged tours.
- Support JYF educational tours by publishing and distributing an educational planner targeted to schoolteachers and administrators
- Engage local tourism and business audiences by hosting appropriate events at the museums.
- Enhance existing JYF marketing website monthly to promote special events, vacation packages, education programs, extended hours and other marketing initiatives.
- Utilize standard JYF customer research as well as state, national and international data to track visitor demographics and behaviors to aid in planning targeted marketing and advertising programs
- Replenish supply of four-color brochures and other printed materials used for broad based marketing initiatives.
- Provide friendly and efficient customer service to visitors, internal and external customers.

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Objective 14507.04

Maintain facilities and grounds in a clean, functioning fashion to help provide a positive visitor experience.

This Objective Supports the Following Agency Goals:

- FACILITIES GOAL: Develop and maintain JYF buildings and grounds.

This Objective Has The Following Measure(s):

- **Measure 14507.04.01**

Number of complaints concerning the maintenance or operation of the JYF facilities noted on the visitor surveys

Measure Type: Outcome **Measure Frequency:** Annually

Measure Baseline: 0

Measure Target: Complaints < 5%.

Measure Source and Calculation:

Number of complaints concerning the maintenance or operation of the JYF facilities noted on the visitor surveys divided by the total number of visitor surveys taken times 100.

Objective 14507.04 Has the Following Strategies:

- Provide the fiscal, personnel and organizational resources, and structure necessary to support activities planned and implemented during the 2006 - 2008 biennium.
- Maintain sufficient staffing and resources to meet compliance and service levels as agency expands while operating in an effective and efficient manner.
- Operate and maintain additional buildings and expanded grounds in accordance with JYF standards.
- Operate and maintain facilities during periods of peak visitation during the commemoration.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, calculate detailed project costs, and ensure quality workmanship.
- Provide landscaping improvements in fulfillment of the landscape plan and the need to screen view sheds in order to improve the public product.

Objective 14507.05

The number of donors making cash or in-kind donations will increase by 10% over the prior fiscal year.

This Objective Supports the Following Agency Goals:

- FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

This Objective Has The Following Measure(s):

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- **Measure 14507.05.01**

Per Cent increase in the number of donors making cash or in-kind donations in FY2007 and FY2008.

Measure Type: Outcome

Measure Frequency: Annually

Measure Baseline: FY2006

Measure Target: 10%

Measure Source and Calculation:

Number of donors making cash or in-kind donations in FY2007 divided by the number of donors making donations in FY2006 times 100 ; and the number of donors making cash or in-kind donations in FY2008 divided by the number of donors in FY2007 making donation times 100.

Objective 14507.05 Has the Following Strategies:

- Increase the levels of private sector support, so that artifact acquisition, selected programs, selected programmatic elements, selected capital projects, and Development Office operations can be fully funded by JYF's private affiliate.
- Increase opportunities for private sector funding support for the expansion of educational programs and projects.